

Process outline:

The Strategic planning process will initially include 3 virtual sessions leading up to an in-person retreat in May 2021. The process is based on COVID 19 considerations and restrictions, and the in-person session will be scheduled with the optimistic expectation that it can be accomplished in May. If an in-person capability is not possible by May 2021 the virtual sessions will continue until the project is completed or an in-person capability is achieved. The objective is for the City of Pflugerville leadership to produce a 3-5 year strategic plan that builds into the 10-20 year planning horizon.

Initial preparation:

1 week prior to Session 1 (~ 11 Feb 2021)– Blake Alexander will send welcome and introductory email to participants to frame the scope of the sessions and stated intent. This will also include a list of any items desired for the participants to have available during the sessions.

City leaders will be asked to review the City's Mission and Vision and be prepared to discuss and validate the City's Mission and Vision during session one.

City leaders will be provided prompts and probing questions using a survey application. Leaders will be asked to submit 3-5 ideas and provide priorities of what they would like to see in the city strategic plan initiatives.

**Session 1- Date TBD (18-20 February 2021)**

Allocated Duration Total: 2 hours \*A break will be taken at approximately the 55 minute mark

<b>Action</b>	<b>Method: WEBEX</b>
Introduction	Introductions, define goals, develop ground rules
Review City Mission and Vision	Collaborative session to confirm/validate the Mission/Vision for the City. We will be prepared to update as required.
Develop a list of Strategic Initiatives	We will begin by conducting a Strengths, Weaknesses, Opportunities and Threats analysis for the city using a 2x2 matrix. City Leaders will determine possible strategic themes for the city.
Develop Screening Criteria	We will conduct a brainstorming session creating a comprehensive list using the 3-5 ideas provided by leaders in the preparation phase as a start point. We will develop Screening Criteria based on the leadership's guidance.
Screen Strategic Initiatives	We will screen the list of possible Strategic initiatives using the Leadership's Screening criteria and ensuring that they also meet the feasibility, suitability, and acceptability test.
RECAP	RECAP the day's activities and provide way ahead to include homework assignment to develop selection criteria

Individual Preparation:

Prior to Session 2 (~ 12 March) Blake Alexander will send reminder email to attendees about homework and refresh objectives.

**Session 2 Date TBD (25-27 March 2021)**

Duration Total: 2 hours

\*A break will be taken at approximately the 55 minute mark

<b>Action</b>	<b>Method: WEBEX</b>
Welcome	Recap, refresh ground rules
Review City Mission and Vision	Reminder to frame the focus and discussion
Review remaining Strategic Initiatives Develop Evaluation Criteria	We will review the screened Strategic initiative from the previous session. Leaders will develop a set of 5-8 evaluation criteria and discuss weighting of any, as a group.
Evaluate Strategic Initiatives and select top 3-5 for further development	Consultant will lead the group in a sample evaluation process and demonstration using one of the City's Strategic Initiatives. Leaders will then evaluate and select top 3-5 Strategic initiatives. The leaders will use a decision matrix as a tool to list and evaluate strategic initiatives.
RECAP	RECAP the day's activities and provide way ahead which includes individual work to analyze the Strategic Initiatives and develop smart goals and measures of performance.

Individual Preparation:

Prior to Session 3 (~10 April) Blake Alexander will send reminder email to attendees about homework and refresh objectives

**Session 3 Date TBD (22-24 April 2021)**

Duration Total: 2 hours

\*A break will be taken at approximately the 55 minute mark

<b>Action</b>	<b>Method: WEBEX</b>
Welcome	Recap, refresh ground rules
Review City Mission and Vision	Reminder Mission/Vision to frame the focus and discussion
Review top 3-5 Strategic Initiatives	Blake will show and confirm with the Leaders the previously selected Top 3-5 Strategic initiatives. Leaders will be broken down into groups of 2-3 to work on each initiative.
Analyze Strategic Initiatives	Breakout groups of Leaders will develop and refine 3-5 SMART Goals and Measures of Performance for each strategic initiative. (This will be an iterative process if there are more than 3 initiatives to be developed.)
Presentations and Feedback	Each Leader breakout group will present their strategic objective to include the SMART goals and Measures of Performance. The group will discuss and provide feedback to gain consensus and approval.
RECAP	RECAP the day's activities and provide way ahead to include possible additional session if incomplete.

**Session 4 (IN PERSON Retreat) (21-22 MAY 2021)**

Duration Total: 10 hours over 2 days \*Breaks will be planned into the retreat schedule throughout

Action DAY 1: 6 hours	Method: In person
Welcome	Recap, refresh ground rules
Review City Mission and Vision	Reminder Mission/Vision to frame the focus and discussion
Develop and refine 3-5 SMART Goals and Measures of Performance	Each Leader breakout group will present their strategic objective to include the SMART goals and Measures of Performance to refresh the group and ensure consensus
Determine and allocate resources for each of the top 3-5 Strategic Initiatives	Leaders will collaborate to determine the resources required and allocation of the appropriate resources to accomplish the goals.
Action DAY 2: 4 hours	
Finalize City Strategic Plan	Leaders will edit and Finalize the Pflugerville Strategic Plan and reach a consensus for approval and implementation
Develop City Critical Information Requirements- See ourselves	City Leaders will assess and determine any factors or developments potentially impacting the Strategic Initiatives in the future. City Leaders will determine what decision(s) these could create. City Leaders will also determine office of primary responsibility for monitoring and oversight.
Discuss Marketing and Communication Strategy for the City	City Leaders will discuss and develop the format for the final product and marketing of the City's Strategic plan. City Leaders will develop the roll out plan, methods, and timing.

**90-180 Day Follow up-**

In person meeting with City Leadership to conduct in progress review of Strategic Initiatives using SMART goals and Measures of Performance. Using Root cause analysis in (Issue, discussion, recommendation) format. Leaders will assess and determine whether any course corrections are necessary.

**1Year Review-**

In person meeting with City Leadership to conduct in progress review of holistic City Strategic Plan at the 1-year mark of implementation. Using the Framework, "What happened, why did it happen, what's next?", City Leaders will discuss current assessment of Measures of Performance and evaluate Strategic Initiatives progress toward the next planning horizon.

